Kansas State
Department of Agricultural Economics
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MDM: Meat Demand Monitor

The MDM tracks U.S. consumer preferences, views, and demand for meat with separate analysis for retail and food service channels. MDM is a monthly online survey with a sample of over 2,000 respondents reflecting the national population.

Willingness to Pay & Projected Market Share

RETAIL	Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
Aug-23 WTP ($/lb)	$17.94	$8.74	$7.05	$5.72	$8.34	$8.33	$9.37	$3.06	
Market Share	9%	24%	13%	8%	25%	3%	5%	7%	7%
Sep-23 WTP ($/lb)	$17.29	$8.88	$7.38	$6.02	$8.60	$8.23	$9.17	$3.13	
Market Share	7%	25%	14%	8%	26%	2%	4%	7%	7%

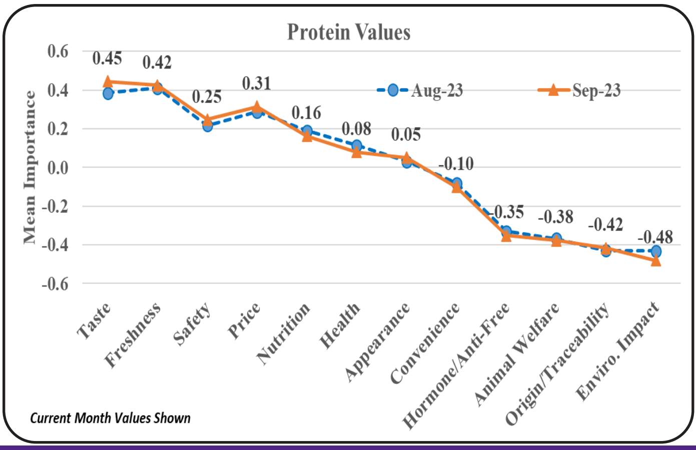
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Aug-23 WTP ($/meal)	$27.48	$21.29	$16.39	$19.24	$18.01	$12.37	$18.64	$18.60	
Market Share	15%	26%	5%	11%	13%	4%	13%	7%	6%
Sep-23 WTP ($/meal)	$26.62	$19.49	$14.54	$17.53	$17.21	$12.19	$17.04	$18.24	
Market Share	16%	25%	4%	9%	14%	4%	12%	8%	7%

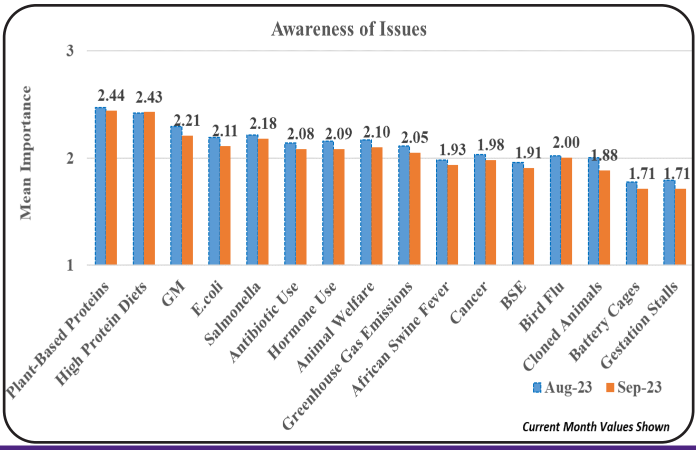
Willingness-to-pay (WTP) increased for five evaluated Retail products, in September compared to August, including Ground Beef, Pork Chops, and Bacon. WTP decreased for all eight evaluated Food Service meals.

The combined beef and pork projected market shares for September are 32% and 22%, respectively at the grocery store and 41% and 14% at the restaurant.

Protein Values & Issues Awareness

Freshness, Taste, Price, and Safety remain most important when purchasing protein. The importance of Price in September was the second highest since the MDM was launched in Feb. 2020; an observation consistent with ongoing household finance and broader macroeconomic concerns (see adhoc section on page 3). Plant-based Proteins and High Protein Diets remain topics heard or read most about.





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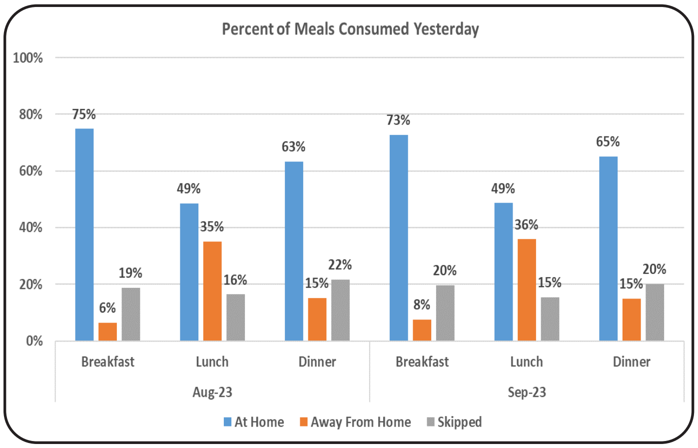
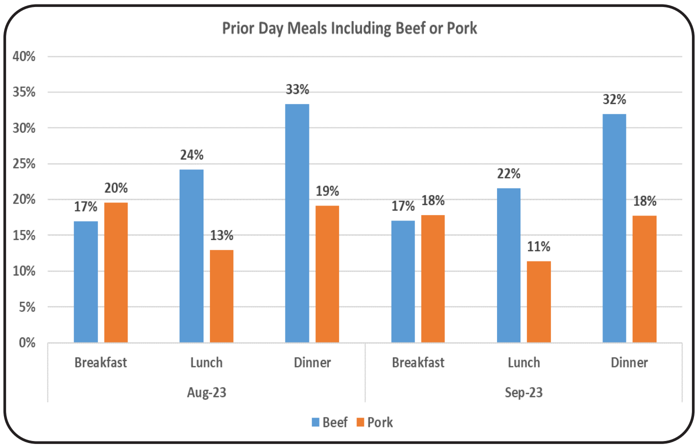
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 49%, and 65% consumed breakfast, lunch, and dinner at home in September with dinner meal rates being higher than in August, consistent with lower dinner-meal food service demand noted on page 1. In September, 17%, 22%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 11%, and 18% of these meals.

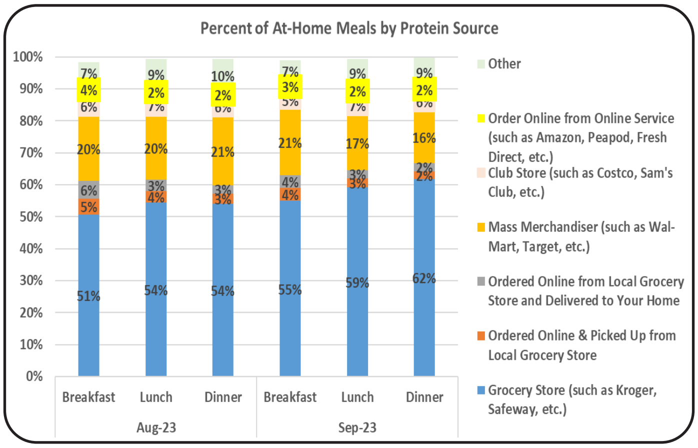


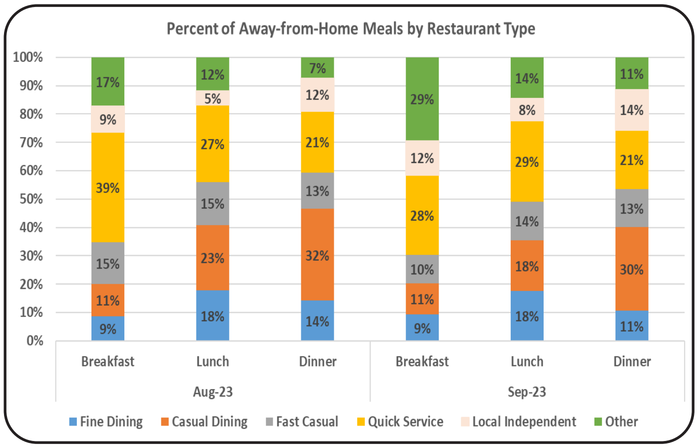


Prior Day Meals: At-Home Protein Source & Restaurant Type

In September, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 26%, 23%, and 22% of breakfast, lunch, and dinner meals.

Meals consumed away-from-home vary in prevalence. Quick Service holds the largest share for breakfast and lunch meals while Casual Dining led for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 49%, 60%, and 64% of breakfast, lunch, and dinner meals in September.





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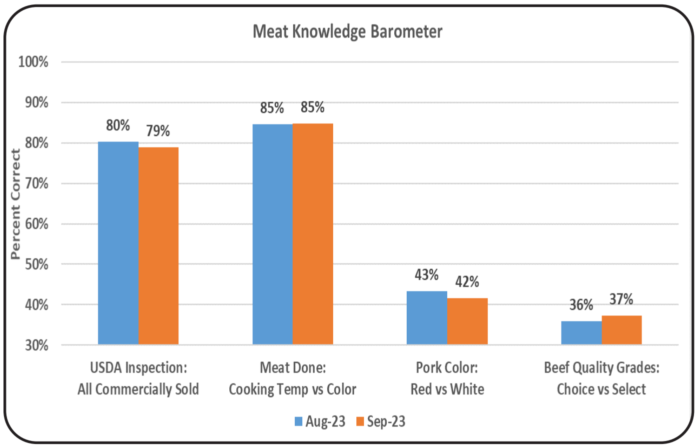
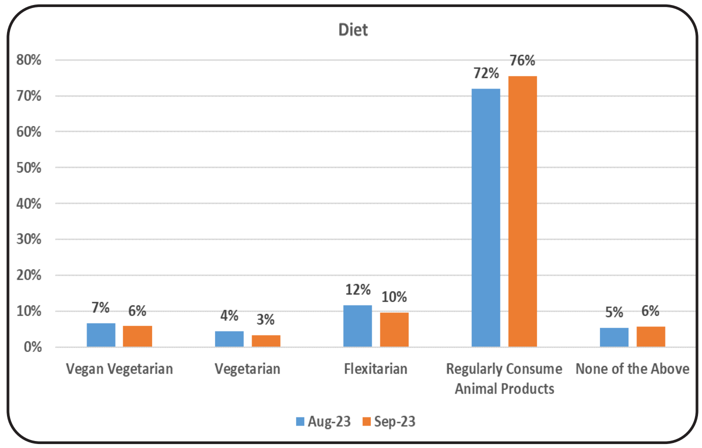
Meat Knowledge & Personal Diet

Consistent with past months, the majority of respondents correctly note USDA inspects all meat sold commercially and cooking temperature is more accurate than color in assessing if meat is "done." Over one-half of respondents incorrectly respond to questions on pork color and beef quality grade information.

In September, 76% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 9% indicate they are either Vegan Vegetarian or Vegetarian.

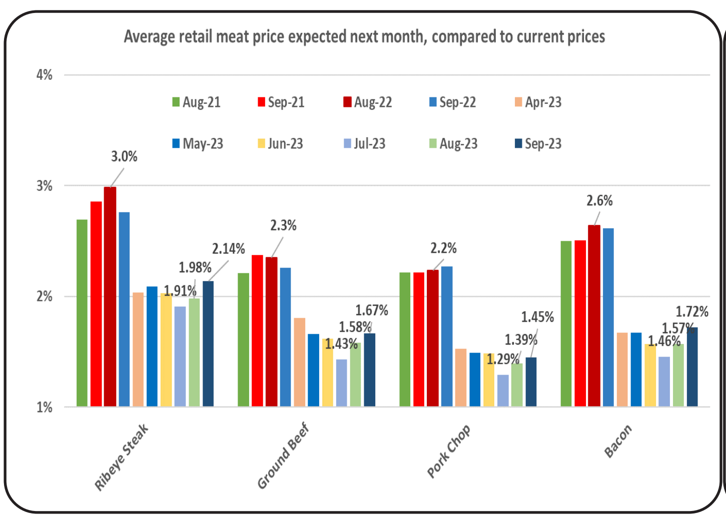


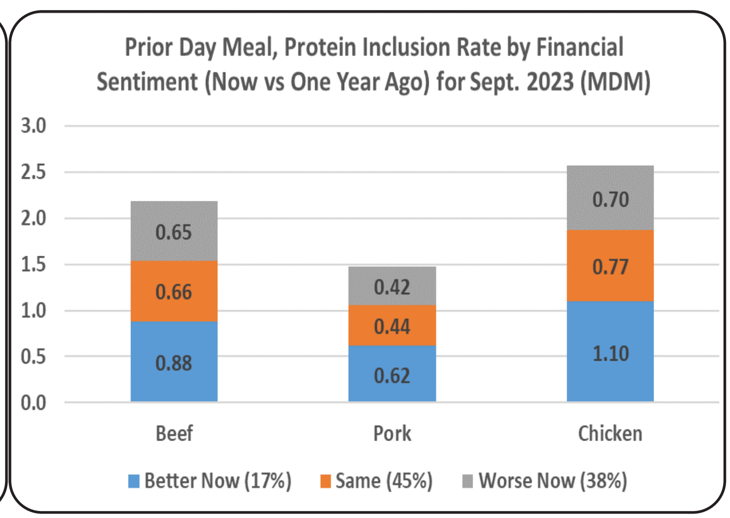


Ad Hoc Questioning

In September respondents built upon the pattern revealed in August that they expect higher price increases in four evaluated retail meat prices. While expected increases remain lower than in 2021, the recent elevated expectations align with corresponding economy-wide inflation discussion.

In addition, only 17% indicate their household finances are better than last year. This is important to domestic meat channels as revealed by notably lower prior day meal inclusion rates (for beef, pork, and chicken) for those saying their finances are the same (45%) or worse (38%) than last year.





For more information about this publication and others, visit AgManager.info.
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Additional MDM Project details including survey questions, past report releases, and a description of methods are available online at: https://www.agmanager.info/livestock-meat/meat-demand/monthly-meat-demand-monitor-survey-data

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